

## Before You Begin LOA

### PA30 or PA20

- IT0000 – Actions
  - View employee's last Action; verify eligible for requested leave
- IT0007 – Planned Working Time
  - see if employee is negative or positive employee. **NOTE:** If negative, use Copy function, change the date to the date of the Action, and change the "Time Management Status" field to a "1". When the employee is re-instated, be sure to go back to IT0007 and change the type back to negative.
  - If employee is using leave for LOA, PT50 to ensure that employee has enough in leave balance.
  - CATS\_DA to see if time has been entered, released and approved.
  - Check to see if any Agency-specific benefits (handled outside of SAP)

Slide 1

This presentation focuses primarily Workers Comp Leave. However, much of the information presented is applicable for any type of Leave of Absence (LOA).

Before processing any type of Leave of Absence (LOA) use the above checklist.

Keep in mind that any Agency-specific benefits are not part of SAP. The Agency will have to work with the employee regarding whether the Agency specific benefits are stopped or if continued how payment will be received.

All Leave of Absences are initiated via ZPAA076 Workflow. When you complete the infotypes and are returned to the Personnel Actions screen, you must click Complete Workflow Item in the Explicitly complete pop-up.

## Complete Work Item

New message Find folder Find document Appointment calendar Distribution lists

Workplace Workflow Initiator

This Work Item Has To Be Completed Explicitly...

Items Log Attachments Agents

### 4601 Create PA Action - Leave of Absence (NC) for Janet Thomas19 - PCR: 1000005161

**Description**  
PCR Initiator.  
Please complete all data for the new personnel action for Employee Janet Thomas19 - Personnel #0000304 based on the attached request.  
\* Make sure to Save your changes before exiting from the screen, and do not press the Complete Work Item button until the necessary changes have been Completed.  
\*\* If you need to Cancel the entire PCR, click once on the work item to highlight it, press the Other functions... button

**Objects and attachments**

- PA PCR Janet Thomas19 PCR 1000005161
- PCR List Workflow Tracker

☒ Complete Work Item ☐ Cancel

	Status	Creation Da	Creation	Pl At	Co	W
- Leave of Absence (NC) for Janet Thomas19 - PCR: 1000005161	✓	06/19/2008	09:24:55	5		✓
- Leave of Absence (NC) for Janet Thomas10 - PCR: 1000005160	✓	06/19/2008	07:57:54	5		✓
- Leave of Absence (NC) for Janet Thomas04 - PCR: 1000005159	✓	06/19/2008	07:57:40	5		✓
- Leave of Absence (NC) for Janet Thomas03 - PCR: 1000005158	✓	06/19/2008	07:57:25	5		✓
- Salary Adjustment (NC) for George Crumley20 - PCR: 1000005155	✓	06/19/2008	18:06:21	5		✓
- SSN - New Hire (NC) for Josh Whalen - PCR: 1000005153	✓	06/19/2008	16:24:07	5		✓
- Leave of Absence (NC) for Patricia Calloway20 - PCR: 1000005151	✓	06/17/2008	17:02:33	5		✓

Tips & tricks: Execute work item ...

### 4601 Create PA Action - Leave of Absence (NC) for Janet Thomas19 - PCR: 1000005161

**Description**  
PCR Initiator.

**Objects and attachments**

- PA PCR Janet Thomas19 PCR 1000005161
- PCR List Workflow Tracker

Slide 2

On every Action, when you complete all infotypes, SAP automatically returns you to the Personnel Actions screen. Be sure to click the Back button so that you get the Explicitly Complete Work Item pop-up. Click the "Complete Work Item button.

## LOA and Negative Employee

Infotype Edit Goto Extras System Help

**Copy Planned Working Time (0007)**

Work schedule

Personnel No. 80000561 Name Dianne Bur

EEGroup A SPA Employees PersA 4601 Cultur

EESubgroup A1 FT N-FLSAOT Perm Statu Active

Start 08/11/2008 To 12/31/9999

Work schedule rule

Time Mgmt status 9 - Negative Time Recording

Working week 0 - No time evaluation

☐ Part-time employee

Working time

Employment percent 8.00

Daily working hours 40.00

Weekly working hours 173.33

Monthly working hrs 2080.00

Annual working hours

Weekly workdays

• If negative—change to positive:

1. PA30
2. IT1007
3. Use **Copy** function
4. Enter the effective start date (leave "to" date to 12/31/9999)
5. In the Time Mgmt status field, select "1" – Positive Time Recording
6. Save
7. PA30 – 0019-Monitoring of task reminder to change back to negative when reinstated from LOA effective date of Reinstatement

Slide 3

If the employee that you are placing on Leave of Absence is a negative employee, use the above steps to change IT0007 from negative to positive. Be sure to create a reminder to change IT0007 back to negative when the employee is returned from LOA.

## Last Day Worked Not for LOA

System Help

**Employee Action Request**

PCR Number: 1000005276  
 Personnel Number: 80000560 Dianne Burger11  
 Last 4 digits(SSN):  
 Effective on: 09/01/2008 Chng: 08/11/08 ZWF INOMPX191 St: M Completed  
 Action: Z2 Re-Instatement (NC)  
 Reason: 07 Rtn from Short Term Dis Comple

CURRENT		PROPOSED	
Pers.Area	4601 Cultural Resources	Pers.Area	4601 Cultural Resources
Subarea	NC01 7day Norm	Subarea	NC01 7day Norm
EE Group	A SPA Employees	EE Group	A SPA Employees
EE Subgroup	A1 FT N-FLSAOT Perm	EE Subgrp	A1 FT N-FLSAOT Perm
Org. Unit	20010337 CR CDS A&H MOH Museum of	Org. Unit	20010337 CR CDS A&H MOH Museum of
Job	30011668 Regional History Museum A	Job	30011668 Regional History Museum A
EE Position	65001724 Administrator Museum Of The C	EE Position	65001724 Administrator Mu

☐ Work Against

**Basic Pay**

CURRENT		PROPOSED	
Pay Scale type	04 T-Grade	Pay Scale type	04 T-Grade
Pay Scale Area	01 Annual Salaries	Pay Scale Area	01 Annual Salaries
Pay Scale Group	T674 Level T6	Pay Scale Group	T674 Level T6
Annual Salary	43,550.00	Annual Salary	43,550.00
Hrly Sal	0.00	Hrly Sal	0.00
Calc Step	0	Calc Step	0
Min	44,670.00	Min	44,670.00
Max	73,833.00	Max	73,833.00
Next Inc Date		Next Inc Date	

**Dates**


Last day worked

Do not use for LOA (only for Separation Pay Continuation and Separation)

Do not enter the last day worked on the PCR. That field is used on when creating a Separation or Separation Pay Continuation Action.

## Create Substitutions Infotype

- All employees on LOA must be on a substituted work schedule



**Create Substitutions (2003)**

Personal work schedule

Personnel No: 80000313    Name: [redacted]    Personnel ar: 4601    Cultural Resources: [redacted]    Status: Active

WS rule: D01N08GN    MTWHF-8, SaS-D    From: 08/14/2008    To: 12/31/9999

Subst. type: 11    LOA - WC Regular

Work schedule rule: D01N08GN    ES grouping: 3    PS grouping: 10

Holiday Calendar ID: [redacted]

If FT, enter D01N08GN; press enter. The remaining fields populate

If PT, enter 3; press enter and then go back and select the WSR from drop down list

"to" date always 12/31/9999

Substitution Type (1) 11 Entries

Type	Text
01	Employee Substitution
02	Shift substitution
05	LOA Generic
06	STD (1st 6 mths prior 89)
07	STD (2nd 6 mths prior 89)
08	STD (1st 6 mths after 89)
09	STD (2nd 6 mths after 89)
10	LOA - FMLA
11	LOA - WC Regular
12	LOA - WC Salary Con
13	LOA - Military

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**Without exception, all employees on LOA must be placed on a Substitution (IT2003).**

**Date:** The substitution is directly related to the Action, therefore, the **From** date should be the date of the Action, and the **To** date should **always** be 12/31/9999.

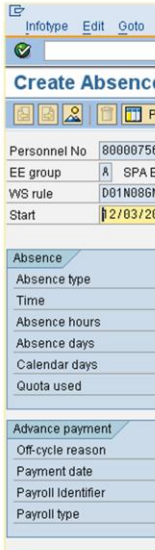
**Substitutions type:** For Workers Comp, the applicable subtypes are :

- 11 LOA – WC Regular
- 12 LOA – WC Salary Continuation

**Daily work schedule:** Leave blank.

**Work Schedule Rule:** If the employee is full-time (40 hours a week), enter D01N08GN in the work schedule field (you must do this even if the employee is already D01N08GN). When you press Enter, the other fields will default with the appropriate information. If the employee is part-time (less than 40 hrs/week), enter a '3' in the ES grouping field. Use the Work schedule rule field matchcode to select the appropriate part-time schedule.

## Absences IT2001



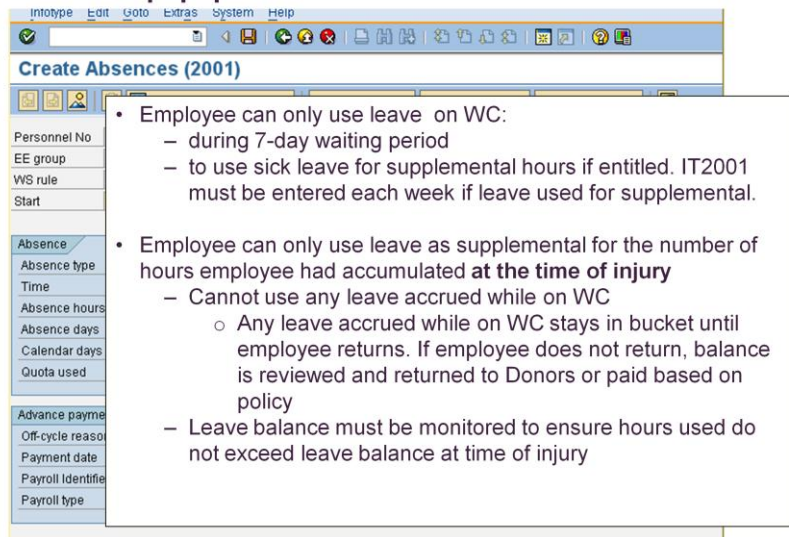
- BEACON was designed that when employee on LOA, IT2001 is responsibility of HR
  - HR has all the LOA paperwork at hand, so “one stop process”
  - Can enter a date range for leave
  - Otherwise, HR must contact Time Admin—increases likelihood that entry will “fall through proverbial cracks”
- Time Eval runs from PA IT2001 (and 2002), not from CATS
- If Time Admin enters on CATS—system designed to automatically create IT2001.
  - If any issue prevents IT2001 being created from CATS, employee not paid appropriately for leave
  - If entered in IT2001 by PA there is no issue
  - Time Admin can only enter one day at a time (rather than range). Therefore, if an employee is out and using leave for 5 months, Time Admin will have to make an entry for each of those work days; whereas in PA IT2001, one entry is made to encompass all of those days.

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The entries made by PA on IT2001 will not appear on CATS\_DA.

## Absences IT2001

- Infotype only appears if a leave type was selected on “subtype for Absences” popup



The screenshot shows the 'Create Absences (2001)' infotype screen. On the left is a list of fields: Personnel No, EE group, WS rule, Start, Absence, Absence type, Time, Absence hours, Absence days, Calendar days, Quota used, Advance payment, Off-cycle reason, Payment date, Payroll identifier, and Payroll type. A popup window is overlaid on the right side of the screen, containing the following text:

- Employee can only use leave on WC:
  - during 7-day waiting period
  - to use sick leave for supplemental hours if entitled. IT2001 must be entered each week if leave used for supplemental.
- Employee can only use leave as supplemental for the number of hours employee had accumulated **at the time of injury**
  - Cannot use any leave accrued while on WC
    - Any leave accrued while on WC stays in bucket until employee returns. If employee does not return, balance is reviewed and returned to Donors or paid based on policy
  - Leave balance must be monitored to ensure hours used do not exceed leave balance at time of injury

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The Absences infotype (2001) indicates the number of hours the employee wants to use for leave and deducts from the leave quotas as applicable. The dates you enter on the Absences infotype should align with the number of hours the employee wants to be paid out for leave. For instance, if the employee wanted to use 40 hours of leave for the week of 12/3/08 through 12/7/08, you would enter those dates in the **Start** and **To** fields. The end date on IT2001 should never be 12/31/9999

The hours that default are based on the work schedule rule entered on the Substitution infotype combined with the dates you enter on the Absences infotype.

Because BEACON is integrated, the hours entered on the Create Absences infotype are fed directly to payroll. A time sheet does not have to be entered. If the Create Absences infotype is not completed, the employee is on leave without pay. If longevity or leave accruals need to be stopped, you should enter 9400 on 2001.

As long as the employee is receiving pay (leave or benefit), benefits will continue to be deducted. If not receiving pay, employee must pay for benefits or discontinue them.

**To use decimals:** Example: Employee has 546.98 hours and wants to use all of them. In LOA Action on IT2001, enter dates so that system calculates as close to whole hours as possible (for example 544). Then process a PA30, IT2001. Enter the effective date with the same from and to date (for example 12/15/08 to 12/15/08). Enter the remaining hours (in the Absence hours column. (2.98 in the example).

## Do Not Use These Codes on WC LOA

- 9680 – Injury Absence WC—employee uses this code only when reinstated from WC to account for doctor's visits, rehab, etc. related to WC injury. Prevents employee from having to use sick.
- 9685 – Injury Leave – absences related to certain types of injury (by inmate/offender) to a teacher in an educational institution.

The screenshot shows the 'Create Absences' window with the following fields filled in:

- Personnel No: 00000327
- EE group: A SPA Empl
- WS rule: D01N086N MT
- Start: 08/18/2008

The 'Absence' section shows:

- Absence type: 96
- Time: 10
- Absence hours: 10
- Absence days: 10
- Calendar days: 10

The 'Payroll' section shows:

- Payroll hours: 10
- Payroll days: 10


The 'Subtypes for infotype "Absences" (1) 15 Entries found' list is as follows:

PSG	A/Aty	Att.labs.	type	text
10	9000		Approved Leave	
10	9200		Sick Leave	
10	9300		Holiday Leave	
10	9400		Leave without Pay	
10	9540		Other Mgmt Approved Leave	
10	9545		Adverse Weather	
10	9547		Communicable Disease	
10	9550		Civil Leave - Jury Duty	
10	9560		Community Service Leave	
10	9565		Community Svc-Tutoring	
10	9570		Educational Leave	
10	9620		Military Training Leave	
10	9630		Military Active Duty	
10	9680		Injury Absence WC	
10	9685		Injury Leave	

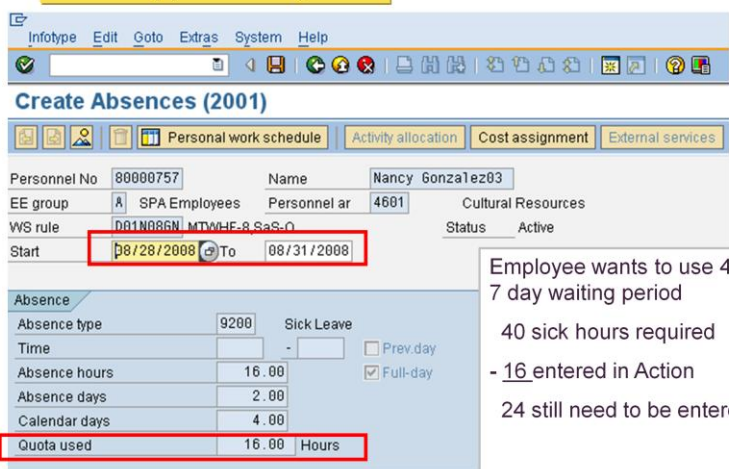
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## Absences (2001) Labor Day Holiday Example



**#1**  
 In LOA Action: Enter leave dates from date of Action up to the holiday (8-28 to 8-31)



Employee wants to use 40 hours for 7 day waiting period  
 40 sick hours required  
 - 16 entered in Action  
 24 still need to be entered in PA30

continued

If the employee is exhausting leave during a time that includes a holiday, additional 2001 infotypes will be necessary to allow the employee to take holiday leave. The additional 2001 records are created in transaction PA30. For example, assume an employee is going out on Workers Comp leave on Thursday, September 28 wants to exhaust sick leave hours during the 7 day waiting period, which will include the Labor Day Holiday September 1.

1. During the LOA Action, select Sick Leave (code 9200) and on the Absences (2001) infotype, enter the dates for the leave to be exhausted up to the holiday period in the Start and To fields:

Start: 8/28/08      To: 8/31/08    (16 hours leave)

By entering the dates above the system calculates that two working days (four calendar) fall within the date range. The substitution previously created issues an 8 hour workday for the employee; therefore, 16 hours default into the Absence hours field.

## Absences (2001) with Holiday (cont.)

#2

On a PA 30, enter  
holiday date (9-1)

Infotype Edit Goto Extras System Help

**Create Absences (2001)**

Personal work schedule Activity allocation Cost assignment

Personnel No 80000757 Name Nancy Gonzalez03  
 EE group A SPA Employees Personnel ar 4601 Cultural Resources  
 WS rule 001N00CN MTWTF--S,3a3-C Status Active  
 Start 09/01/2008 To 09/01/2008

**Absence**

Absence type 9300 Holiday Leave  
 Time - ☐ Prev.day  
 Absence hours 8.00 ☒ Full-day  
 Absence days 1.00  
 Calendar days 1.00  
 Quota used 8.00 Hours

continued

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2. Create a PA30 to enter the holiday period, infotype 2001, subtype 9300:

**Absences (2001) with Holiday (cont.)**

INTEGRITY BEACON  
CONSISTENCY North Carolina  
Office of the State Controller

#3 On a PA30, enter leave dates for rest of 7 day sick

Infotype Edit Goto Extras System Help

**Create Absences (2001)**

Personal work schedule Activity allocation Cost assignment

Personnel No 80000757 Name Nancy Gonzalez03  
 EE group A SPA Employees Personnel ar 4601 Cultural Resources  
 WS rule D01N086N MTWHF-8,SaS-O Status Active  
 Start 09/02/2008 To 09/04/2008

Absence

Absence type	9200	Sick Leave
Time		<input type="checkbox"/> Prev.day
Absence hours	24.00	<input checked="" type="checkbox"/> Full-day
Absence days	3.00	
Calendar days	3.00	
Quota used	24.00	Hours

Employee wants to use 40 hours for 7 day waiting period  
 16 entered in Action  
 + 24 entered in PA30  
 40 hours sick leave entered

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3. Create a PA30 to enter the remaining leave, in this case 24 hours, infotype 2001, subtype 9200

Start: 09/02/08 To: 09/04/08 (24 hours **sick leave**)

By entering the data on the Absences infotype as explained in this manner it is not necessary for a separate time sheet to be entered for the employee. If data is not entered on this infotype, the employee is on leave without pay.

### Using Leave Accrued While Out

An employee who is out on Workers Comp cannot use any leave that is accrued while out. The accrued leave is only available for use when the employee is reinstated from WC. If the employee does not return to work, the accrued leave is reviewed and paid or return to Donors according to State policy.

## Benefits Overview


- Benefits
    - Employee receives LOA Continuation notice (transaction ZBNS008)
    - Employee returns to BEST indicating "continue" or "do not continue"
    - BEST changes benefits as applicable
    - Vendors are notified electronically if benefits are stopped
- STD employees who continue benefits and receive any type of pay:
- both health insurance and NCFlex premiums deducted from STD payments on an after-tax basis.
- STD employees who continue benefits and not receiving any type of pay:
- Must mail health insurance premiums to BEST Shared Services Payroll by last day of each month
  - Must send monthly check directly to NCFlex vendor

Employees who are out on leave of absence without pay will receive an LOA Continuation form letter. The form letter is generated by either HR or Benefits using transaction code ZBNS008. The letters are associated with IT0019 and the "estimated return date" task. That is why it is so important that during the Action, you use IT0019 to create that task.

On the form, the employee indicates if benefits should be continued or stopped and returns the form to BEST. If the benefits are to be continued, as long as the employee is receiving pay (leave or STD payments), the deductions for benefits will automatically occur on an after-tax basis. If the employee is not receiving either STD payments or leave, then the employee must send a check as applicable by the benefit deadline date. NC Flex must be sent directly to the vendor according to the vendor's deadline. Insurance premiums are sent to BEST by the last day of each month.

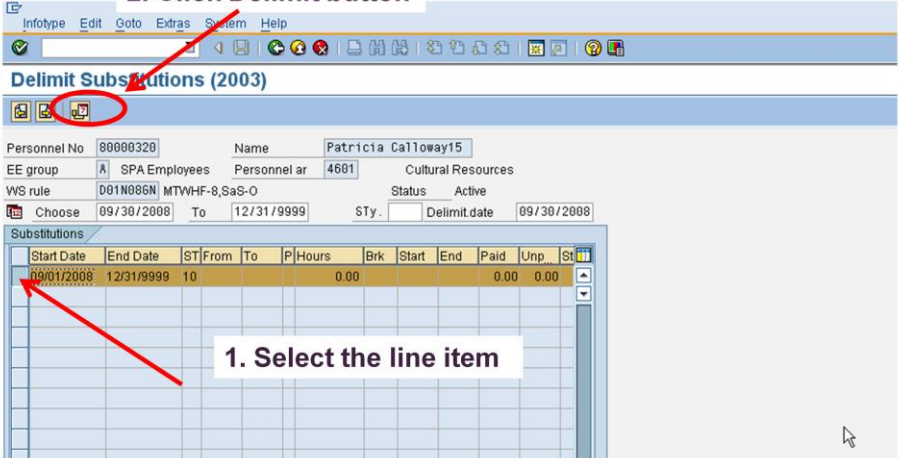
If the employee has Agency specific deductions, those are handled outside of SAP. The Agency should notify the employee about the process in those cases.

## Reinstatement of LOA



North Carolina  
Office of the State Controller

2. Click Delimit button



2. Click Delimit button

1. Select the line item

Personnel No 00000320 Name Patricia Calloway15

EE group A SPA Employees Personnel ar 4601 Cultural Resources

WS rule 001N086N MTWHF-8,SaS-O Status Active

Choose 09/30/2008 To 12/31/9999 STy Delimit date 09/30/2008

Start Date	End Date	ST	From	To	P	Hours	Brk	Start	End	Paid	Unp	St
09/01/2008	12/31/9999	10				0.00				0.00	0.00	

When the employee is reinstated, infotype 2003-Delimit appears in the Action. Select the line item and click the Delimit button to delimit the Substitution work schedule. Doing this step automatically returns the employee to his or her regular work schedule that was applicable before the employee went on leave of absence. Remember, if the employee was a negative employee, you must use PA30 to change IT0007 back to negative.

## Reinstatement of Negative Employee

Infotype Edit Goto Extras System Help

**Copy Planned Working Time (0007)**

Work schedule

Personnel No 88000561 Name Dianne Burge

EEGroup A SPA Employees PersA 4601 Cultural

EESubgroup A1 FT N-FLSAOT Perm Statu Active

Start 12/31/2008 To 12/31/9999

Work schedule rule

Time Mgmt status

Working week

☐ Part-time employee

Working time

Employment percent

Daily working hours

Weekly working hours

Monthly working hrs

Annual working hours

Weekly workdays

0110000 MTWTF-8,8AS-U

- Positive Time Recording

- No time evaluation

- Positive Time Recording

- PDC time evaluation

- Time evaluation without payroll integration

- External services

- Negative Time Recording

- If negative—change back to negative:
  1. PA30
  2. IT1007
  3. Use **Copy** function
  4. Enter the effective start date (leave "to" date to 12/31/9999)
  5. In the Time Mgmt status field, select "9" – Negative Time Recording
  6. Save

Slide 14

If you forget to revise IT0007 – Planned Working Time when a negative employee is reinstated, the employee will not receive any premium pay (life shift differential, overtime, etc.) that he or she is entitled to.

Workers Comp (WC) LOA		
Action	Reason and Definition	Employment Status
<b>LOA</b>  <b>Action:</b> LOA via ZPAA076 Workflow with applicable reason	<ul style="list-style-type: none"> <li>W/C 7 day waiting period – employee waiting period before workers' compensation begins payment.</li> <li>W/C Leave of Absence w/supplement – employee is placed on this WC on 8<sup>th</sup> day of workers' comp and is exhausting eligible sick leave hours during WC leave (see OSP schedule for eligible hours).</li> <li>W/C Leave of Absence – employee is placed on Workers' Compensation.</li> <li>W/C LEO Continuation Pay – employee is a law enforcement officer being placed on Workers' Compensation with Continuation Pay up to 2 years.</li> <li>W/C Correctional Officer (Custody) – employee is placed on Workers' Compensation (only for Correctional Officers).</li> </ul>	Active
<b>Infotypes:</b> <ul style="list-style-type: none"> <li>0000 – Actions</li> <li>0001 – Org Assignment</li> <li>0019 - Monitoring of Tasks</li> <li>0040 – Objects on Loan</li> <li>2003 – Substitutions</li> <li>2001 – Absences (only if a leave type was selected in pop-up)—7 day waiting period only time can be used on WC or supplemental hours</li> <li>0416 – Time Quota Compensation (only a payout type was selected in pop-up)—7 day waiting period only time can be used on WC</li> </ul>		

As indicated earlier, a WC LOA is an Action that must be initiated via ZPAA076 and go through the Workflow process.

Above are the reasons listed for the WC LOA Action. You can see that “injury leave” is not an appropriate reason for WC. That reason is used only for certain types of injury by specific classifications of employees who are entitled to a period of time up to 2 years absence due to injury. Only when the employee in this category has exhausted 2 years is he or she eligible for WC. When eligible for WC the employee does not have to go through the 7 day waiting period.

The infotypes processed during the WC LOA Action are the same infotypes that are processed on any Leave of Absence Action.



## WC - 7 day waiting period

Assumption for Webinar: All WC documentation and policies have been appropriately processed.

- 7 day waiting period does not include the day of the injury
  - Employee can use leave or be unpaid
- Even partial day with lost wages is counted as full day
  - Reasonable time for travel to and visit with doctor is not counted
- 7 days can be consecutive or non-consecutive
  - Several LOA Actions needed if 7 days are not used consecutively
- Counting weekends as part of 7 day waiting period (has not changed):
  - Doctor's note takes employee out on Friday and says can return Monday
    - **count weekend**
  - Employee hurt early in week-- is back to work on Friday but out again on Monday – **do not count weekend**
  - Employee out on Friday and out on Monday – **count weekend**
- Day 8 – if employee is still out, new LOA Action with applicable WC reason; if returned to work, then Reinstatement Action and PA30 for IT0007 if applicable

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The 7-day waiting period does not include the day of the injury (employees are paid in full the day of the accident regardless of what time employee went out). The employee may elect to use leave in order to receive pay during the 7 day waiting period, or may elect to take the time off unpaid.

If the employee is out a partial day with lost wages, that is counted as one whole day. Do not count doctor's appointments or treatments for the accident as absences because employees are paid as if they worked for reasonable time and travel to the doctor. The 7 days are counted just as they were prior to BEACON. The determining factor for counting is lost wages.

The 7 days can be consecutive or non-consecutive. If non-consecutive, then several LOA Actions will be needed.

Use IT0019 to keep track of when the 7 day waiting periods ends. On the 8<sup>th</sup> day, a new LOA Action is required with the applicable reason.



## 7 Day Waiting Consecutive Example

**Situation:** Non-law enforcement/non-Correctional Officer employee. First day of 7 day waiting period is 8/26/08; using sick leave for 7 day waiting period.

PA30, IT0007: If negative employee, use Copy function to change to Positive (reminder to change back when Reinstated)

- **1<sup>st</sup> Action: LOA Workflow (ZPAA076)** effective Tuesday 8/26/08.
  - Reason: WC 7 day waiting period
- After approval received, execute Personnel Action:
  - IT000 Actions – Save
  - IT0001 Org Assignment – Save
  - IT0019 Monitoring of Tasks – Enter reminder date for **8<sup>th</sup> day (9/2)** that if employee has not returned a new Action is needed—either new LOA or Reinstatement
  - IT0040 Objects on Loan – Skip or Delimit Objects on Loan according to Agency policy
  - IT2003 Substitutions - Enter **effective date of Action 8/26** and **end date 12/31/9999**. Select **"WC Regular"** as substitution type and **Work Schedule rule** as applicable for FT or PT
  - Pop-up for Absences subtype: select **applicable leave type (9200 sick)**
  - IT2001 Absences - **enter dates 8/26 – 8/31 (because of holiday)** that correspond to requested leave hours (in this case 8/26 – 8/31 are days 1, 2, 3, 4, 5 and 6 of the 7 day waiting period).
  - Pop-up for lump sum payout – Close, not applicable for WC
- PA30, IT2001, Subtype 9300 – for holiday **9/1 – 9/1**

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## 7 Day Waiting Consecutive Example (cont.)



**Situation (cont.):** Status check on employee on 9/2; employee did not return to work. 7 day waiting period ended 9/1. Employee using sick for supplemental.

- **2<sup>nd</sup> Action: LOA Workflow (ZPAA076) effective 9/2/2008 (8<sup>th</sup> day)**
  - Reason: WC Leave of Absence w/Supplement \*
  - \* If not w/Supplement, would have been WC Leave of Absence
- After approval received, execute Personnel Action:
  - IT000 Actions – Save
  - IT0001 Org Assignment – Save
  - IT0019 Monitoring of Tasks – Enter reminder date for **30 day status check** to see if employee has returned
  - IT0040 Objects on Loan – Skip or Delimit Objects on Loan according to Agency policy
  - IT2003 Substitutions - Save. Information defaults from previous LOA entry.
  - Pop-up for Absences subtype: Enter dates for sick leave.
  - Pop-up for lump sum payout – Close. Not applicable for WC
- PA30 IT0019 reminder that IT2001 must be entered for the supplemental sick leave for each week employee is out.
- PA30 IT0019 reminder that HR and/or Leave Admin must track supplemental hours being used to ensure not to exceed hours earned up to date of injury
- PA30 IT0019 reminder for estimated return date

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## 7 Day Waiting Non-Consecutive Example

**Situation:** Employee is Non-law enforcement/non-Correctional Officer. First day of 7 day waiting period is 1/11/08 and is not using leave for 7-day waiting period.

- **1<sup>st</sup> Action: LOA Workflow (ZPAA076)** effective Friday 1/11/08
  - Reason: WC 7 day waiting period
- After approval received, execute Personnel Action and applicable infotypes
  - IT0019 reminder to track 7 day waiting period
  - IT0007 to positive if applicable

**Situation (cont.):** Employee returns to work on Wednesday 1/16/08

- **2<sup>nd</sup> Action: Reinstatement**
  - Reason: Return from WC Complete
- After approval received, execute Personnel Action and applicable infotypes (includes delimit IT2003 in the Action)
  - IT0007 to negative if applicable
    - » previous LOA is automatically delimited to 1/15. BEACON has counted days 1/11, 1/12, 1/13, 1/14 and 1/15 as lost days 1 through 5 (which includes Friday, Saturday, Sunday, Monday and Tuesday).

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For the purposes of illustration, we will assume that an employee's first day of the 7 day waiting period is 1/11/08. Employee has chosen not to use leave for the 7-day waiting period. Initiate LOA Action – WC 7 day waiting period, effective 1/11/08.

Employee returns to work on Wednesday 1/16/08 (initiate Reinstatement Action – Return from WC Complete, effective 1/16/08). When you enter the Reinstatement, the previous LOA Action is automatically delimited to 1/15. That means that the system has counted days 1/11, 1/12, 1/13, 1/14, and 1/15 as lost days 1 through 5 (which includes Friday, Saturday, Sunday, Monday and Tuesday). Employee works through 1/21.

## 7 Day Waiting Non-Consecutive Example (cont.)



**Situation (cont):** Employee works through 1/21; calls on 1/22 and says has doctor's note to continue to be off work.

- **3<sup>rd</sup> Action:** LOA Workflow (ZPAA076) effective 1/22/08
  - Reason: **WC 7 day waiting period**
- After approval received, execute Personnel Action and applicable infotypes
  - PA30, IT0007 if applicable
    - » Reinstatement is automatically delimited to 1/21. BEACON begins counting day 6 with 1/22/08.
    - » Use IT0019 reminder for approximately 1/24 to begin new Action if employee has not returned.

**Situation (cont):** Employee has not returned as of 1/24 which means new Action needed.

- **4<sup>th</sup> Action:** LOA Workflow (ZPAA076) effective 1/24/08
  - Reason: **Either WC LOA w/supplement or WC Leave of Absence**
- After approval received, execute Personnel Action and applicable infotypes
  - » WC 7 Day Waiting period is automatically delimited to 1/23. BEACON counted 1/22 and 1/23 as days 6 and 7 of the 7 day waiting period.

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Employee calls on Tuesday 1/22 to say has doctor's note and won't be returning indefinitely (initiate LOA Action – WC 7 day waiting period effective 1/22).

On 1/24/08 the employee still has not returned. The 7 day waiting period ended 1/23/08 and benefits would begin on the 8th lost day which is 1/24 (initiate LOA Action – WC for applicable reason (either w/supplement or WC Leave of Absence). The system automatically calculates employee's last two lost days in the 7-day waiting period as 1/22 and 1/23.

If the employee is on WC LOA w/supplement, either the Time Admin or HR will have to enter the number of supplemental hours each week. In addition, either HR or Leave Admin will need to monitor to ensure that only the sick leave balances that were accrued prior to injury are used as supplemental.

## WC LOA LEO

**Situation:** Law Enforcement Officer injured on the job. **One Action (no 7 day waiting period).**

- Action: LOA Workflow (ZPAA076) , Reason: **WC LEO Continuation Pay**
- After approval received, execute Personnel Action and execute all infotypes as applicable:
  - IT000 Actions – Save
  - IT0001 Org Assignment – Save
  - IT0019 Monitoring of Tasks – Enter reminder date for **estimated return date or 30 days status check**
  - IT0040 Objects on Loan – Skip or Delimit Objects on Loan according to Agency policy
  - IT2003 Substitutions - Enter **effective date of Action** and end date **12/31/9999**. Select **“WC Salary Cont”** as substitution type and **Work Schedule rule** as applicable for FT or PT
  - Pop-up for Absences subtype: Click X to close.
  - Pop-up for lump sum payout – Close
- PA30 IT0019 Monitoring of Tasks – Enter reminder date **for when salary continuation will stop (can receive no longer than 2 years)**

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## Reinstate WC Employee

Action	Reason and Definition	Employment Status
Reinstatement (continued)	<ul style="list-style-type: none"><li>• Return from Worker's Comp Trial Rehab - return to service in the same capacity that existed prior to the WC Leave. Based on doctors note.</li><li>• Return from Worker's Comp Complete - return to work.</li></ul>	Active

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## Reinstate WC Complete Recovery

**Situation:** Employee is able to return to work and has been released by doctor.

- Action: Reinstatement Workflow (ZPAA076)
  - Reason: Return from WC Complete
- After approval received, execute Personnel Action PCR
  - IT000 Actions – Save
  - IT0001 Org Assignment – Save
  - IT0041 Date Specifications – Save
  - IT0040 Objects on Loan – Save or Add Objects on Loan depending upon whether you delimited objects on LOA
  - IT2003 Substitutions – Delimit
- PA30 if negative employee – use Copy function with effective date of Action to return employee to negative time

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## Reinstate WC Partial Rehab

**Situation:** Employee is able to return to work for 4 hours and will be paid by WC the other 4 hours.

### DO NOT ADJUST IT0007 for partial hours!

- Action: Reinstatement Workflow (ZPAA076)
  - Reason: Return from WC Trial Rehab
- After approval received, execute Personnel Action PCR
  - IT000 Actions – Save
  - IT0001 Org Assignment – Save
  - IT0041 Date Specifications – Save
  - IT0040 Objects on Loan – Save or Add Objects on Loan depending upon whether you delimited objects on LOA
  - IT2003 Substitutions – Delimit
- PA30 IT2003 – Create function, same date as Reinstatement, WSR: D15N04GN (4 hours) for full time employee.
- PA30 IT0008 – Copy function, same date as Reinstatement, revise annual salary based on hours worked

Employee enters:

- 9400 for 4 hours (or 9680 for time off for WC-related appointments, rehab etc.)
- 9500 for 4 hours worked

Leave Administrator adjusts holiday quotas as required

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### Reinstate an employee from WC trial rehab working less than 40 hours:

1. Enter a Reinstatement Action with WC Trial Rehab as the reason on the appropriate effective date.
2. After you complete the Reinstatement Action, use PA30 with the same effective date. Create a Substitutions infotype (2003) putting the employee on Work Schedule D15N04GN (4 hrs) or equivalent. **NOTE:** If the employee is part-time (less than 40 hrs/week), enter a '3' in the ES grouping field. Use the matchcode in the Work schedule rule field to select the appropriate part-time schedule.
3. Use PA30 (same effective date) and use the Copy button to revise the annual salary. Example: The employee is working 4 hours and receiving 4 hours WC; the annual salary will change by 50%.
4. The Leave Administrator will need to adjust holiday quotas as required.
5. The employee will enter time worked on a timesheet.